

The logo for TAXCOMM features the word in a bold, sans-serif font. The letters are color-coded: 'T' is dark blue, 'A' is light green, 'X' is light green, 'C' is light green, 'O' is light green, 'M' is light green, and the final 'M' is teal. The background is white with green geometric shapes on the left and right sides.

TAXCOMM

The Complete Client Communication Tool

Developed for tax professionals

What Is TaxComm?

- ▶ Securely transfer files.
- ▶ Document signatures.
- ▶ Video meeting.
- ▶ Secure messaging.



Secure web based application. Tax client mobile application.

Why Is TaxComm The Tool For You?

- ▶ Designed for the tax professional.
- ▶ Adapt and embrace our new normal. Streamline the process of working with clients and their tax documents remotely.
- ▶ Grow your practice.
- ▶ Keep things personalized.

Main Communication Dashboard Page



TAX ORGANIZATION: Scotts Tax Service
TAX CLIENT: Scott TaxClient



HOME



EDIT CLIENT

ACTION CENTER

ADD ACTION ▼



SIGN DOCUMENT

Sign US 8879 via Signature Pad

EDIT

DELETE



REQUESTED DOCUMENT

Drivers License

EDIT

DELETE



SCHEDULED MEETING

Join Meeting - 11/17/2020 09:34 AM

DELETE



COMPLETED ACTIONS

RECENT FILES



TWFED8879.PDF

Uploaded on 11/17/2020 09:21:05

VIEW

DELETE



TWFED8879.PDF

Uploaded on 11/14/2020 20:21:15

VIEW

DELETE



TWFED1040.PDF

Uploaded on 11/17/2020 09:00:57

VIEW

DELETE



US8879.PDF

Uploaded on 11/14/2020 22:09:44

VIEW

DELETE



TWFED8879.PDF

Uploaded on 11/14/2020 20:54:13

VIEW

DELETE



US8879.PDF

VIEW

SELECT FILES

Or drop files here



Document Transfer

- ▶ Sharing documents between you and your clients.
- ▶ Tax professional can view/edit. Tax client can only view.
- ▶ Tax client can use the web application or the mobile application.



HOME

EDIT CLIENT

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ALL RIGHTS RESERVED.

ACTION CENTER

ADD ACTION

SCHEDULED MEETING
Join Meeting - 11/18/2020 09:54 AM

JOIN

EDIT

DELETE

COMPLETED ACTIONS

ESTABLISH SIGNATURE PIN - TAXPAYER
Taxpayer - Please establish a PIN for document signing

DELETE

RECENT FILES

ID VERIFICATION LIKE A DRIVERS LICENSE
CATHERINE_WITHBACKGROUNDSMALLER.JPG
Uploaded on 11/18/2020 09:49:02

VIEW

DELETE

CA BUSINESS TAX UPDATE CTEC CE 10-20
SLIDES.PDF
Uploaded on 11/18/2020 09:39:04

VIEW

DELETE

SELECT FILES

Or drop files here

Actions - When a Tax Pro needs specific things accomplished.

- ▶ The action center is used to create and track specific items: things like a drivers license, a due diligence school record, or please sign this 8879.
- ▶ When you request actions to be done by your client the will receive a text or email notification.
- ▶ When actions are completed by your tax client, you will receive notifications of completion.



HOME

EDIT CLIENT

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ALL RIGHTS RESERVED.

ACTION CENTER

ADD ACTION ▾

SCHEDULED MEETING

Join Meeting - 11/18/2020 09:54 AM

JOIN

EDIT

DELETE

COMPLETED ACTIONS

ESTABLISH SIGNATURE PIN - TAXPAYER

Taxpayer - Please establish a PIN for document signing

DELETE

RECENT FILES

TWFD1040.PDF

Uploaded on 11/19/2020 07:51:24

VIEW

DELETE

ID VERIFICATION LIKE A DRIVERS LICENSE
CATHERINE_WITHBACKGROUNDSMALLER.JPG

Uploaded on 11/18/2020 09:49:02

VIEW

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CA BUSINESS TAX UPDATE CTC CE 10-20
SLIDES.PDF

Uploaded on 11/18/2020 09:39:04

VIEW

DELETE

SELECT FILES

Or drop files here

Document Signatures

The image displays the IRS e-file Signature Authorization form (Form 8879) and its mobile application interface. The top left shows the 'SIGN DOCUMENT US 8879' header with 'Save' and 'Cancel' buttons. The form is titled 'IRS e-file Signature Authorization' and includes a 'Submission Identification Number (SID)' field. The 'Taxpayer's name' and 'Social security number' fields are visible. The form is divided into two parts: 'Part I Tax Return Information' and 'Part II Taxpayer Declaration and Signature Authorization'. The 'Taxpayer's PIN' section is highlighted, showing the 'I authorize' checkbox and the 'I will enter my PIN as my signature' checkbox. The 'Spouse's PIN' section is also visible. The bottom left shows a mobile application interface with a 'Document Viewer' header and an 'UPLOAD SIGNED DOCUMENTS' button. The application displays the 'Taxpayer's PIN' section, showing the 'I authorize' checkbox and the 'I will enter my PIN as my signature' checkbox. The application also displays the 'Spouse's PIN' section. The bottom right shows a mobile application interface with a 'Document Viewer' header and an 'UPLOAD SIGNED DOCUMENTS' button. The application displays the 'Taxpayer's PIN' section, showing the 'I authorize' checkbox and the 'I will enter my PIN as my signature' checkbox. The application also displays the 'Spouse's PIN' section.

SIGN DOCUMENT US 8879

Form **8879** IRS e-file Signature Authorization OMB No. 1545-0074

Department of the Treasury Internal Revenue Service

2019

Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) _____

Taxpayer's name _____ Social security number _____

Spouse's name _____ Spouse's social security number _____

Part I Tax Return Information — Tax Year Ending December 31, 2019 (Whole dollars)

Line	Description	Amount
1	Adjusted gross income (Form 1040 or 1040-SR, line 8); Form 1040-NR, line 35	1
2	Total tax (Form 1040 or 1040-SR, line 16; Form 1040-NR, line 61)	2
3	Federal income tax withheld from Forms W-2 and 1099 (Form 1040 or 1040-SR, line 17; Form 1040-NR, line 62a)	3
4	Refund (Form 1040 or 1040-SR, line 21a; Form 1040-NR, line 73a; Form 1040-SS, Part I, line 13a)	4
5	Amount you owe (Form 1040 or 1040-SR, line 23; Form 1040-NR, line 75)	5

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2019, and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgment of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-866-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☐ I authorize _____ ERO firm name _____ to enter or generate my PIN _____ as my signature on my tax year 2019 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature _____ Date _____

Spouse's PIN: check one box only

☐ I authorize _____ ERO firm name _____ to enter or generate my PIN _____ as my signature on my tax year 2019 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature _____ Date _____

Practitioner PIN Method Returns Only—continued

III Certification and Authentication — Practitioner PIN Method

1. Enter your six-digit EFIN followed by your five-digit self-select PIN.

2. Enter your six-digit EFIN followed by your five-digit self-select PIN.

3. Enter your six-digit EFIN followed by your five-digit self-select PIN.

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99. Enter your six-digit EFIN followed by your five-digit self-select PIN.

100. Enter your six-digit EFIN followed by your five-digit self-select PIN.

- ▶ Allows for both wet or electronic signatures.
- ▶ Clients can sign from either the web application or the mobile application.
- ▶ Tax forms automatically read the form for signature placement.
- ▶ Other documents can have signatures moved to applicable locations.

MOBILE DEVICES

ACTION CENTER

SCHEDULED MEETING
Join Meeting - 11/18/2020 09:54 AM

JOIN

REQUESTED DOCUMENT
Please Send your drivers license

OPEN

SIGN DOCUMENT
Sign Document

OPEN

SIGN DOCUMENT
Sign US 8879 via Signature Pad

OPEN

SIGN DOCUMENT
Sign US 8879 via Signature Pad

OPEN

COMPLETED ACTIONS

ESTABLISH SIGNATURE PIN - TAXPAYER
Taxpayer - Please establish a PIN for document signing

RECENT FILES

TWFED8879.PDF
Uploaded on 11/19/2020 08:10:42

VIEW

TWFED8879.PDF
Uploaded on 11/19/2020 08:09:01

VIEW

TWFED1040.PDF
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ID VERIFICATION LIKE A DRIVERS LICENSE
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CA BUSINESS TAX UPDATE CTEC CE 10-20
SLIDES.PDF
Uploaded on 11/18/2020 09:39:04

VIEW

SELECT FILES

Or drop files here



Video Meeting

- ▶ Keep things personalized.
- ▶ Grow your practice.

TaxPro Request Meeting

Meeting Title

Sample Meeting

Meeting Date

11/17/2020 09:34



Save

Cancel



SCHEDULED MEETING

Join Meeting - 11/17/2020 09:34 AM

JOIN

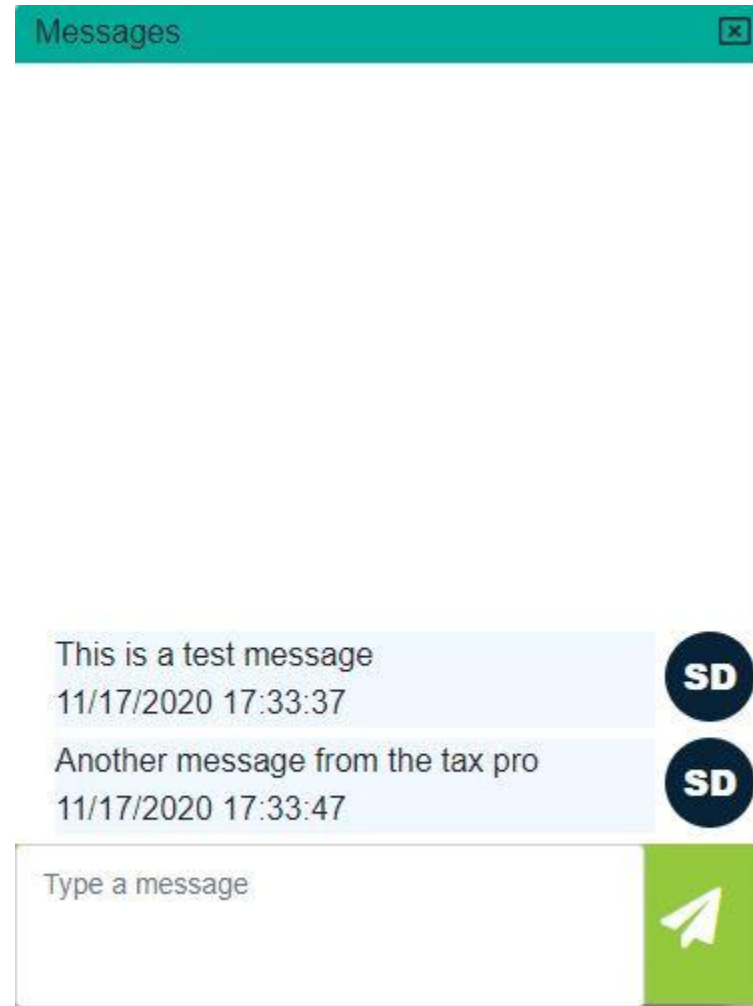
EDIT

DELETE



Messaging


- ▶ Secure format for privileged communications.
- ▶ Notifications are sent via email or text.



Client Selection Page

TAXCOMM

TAX ORGANIZATION: Scotts Tax Service



 ADD CLIENT

WARNING: Only 49 emails available, Only 50 texts available [Click here to update your subscription](#)

Search By: Name ▼

Q Search...

Filter By: All ▼

STATUS	NAME	SSN	PHONE	EMAIL
11 OUTSTANDING	TaxClient, Scott	xxx-xx-1234		scwam7@gmail.com 

- ▶ The Tax Pro client selection page allows you to quickly find the tax client you are working with.
- ▶ Filters, status, and color indications help you to find clients that have finished an action, uploaded docs, or sent new messages.

TaxComm

- ▶ The Tax Pro is the licensed paid subscriber. There is no additional charge for the tax client.
- ▶ Tax client mobile app will be available in android and iphone.
- ▶ The Tax Pro sets the notification business rules.

TAXCOMM TAX ORGANIZATION: Tax Organization

EDIT TAX CLIENT

Client Type: Individual Filing Status: [Dropdown]

First Name: [Text] Middle Initial: [Text] Last Name: [Text]

Date of Birth: [Text] Scott,

Tax professional: [Text]

Address: [Text]

Zip: [Text]

Home Phone: [Text]

Email: [Text]

Email Validation Status: [Text]

Enter Validation Code Received from:

I have authorized an account for you with Taxcomm.NET so that we can communicate regarding anything related to your taxes. If you can take a moment to complete your account setup then it will give you access to some great web and mobile apps that you can use to organize and secure your tax information throughout the year.

1. Easily capture and store images of important tax documents
2. Securely meet with me in private virtual meetings
3. When necessary sign documents

To setup your account, just click here:
<https://taxcomm.net/Identity/Account/RegisterWithInvitation/ab66c998-65e098c325352>

Looking forward to working with you for all of your tax preparation needs

Regards, Scott Dalton

TAXCOMM TAX ORGANIZATION: Tax Organization

TaxPro Edit

First Name: [Text] Last Name: [Text]

Email Address: [Text]

Mobile / Cell Phone Number: [Text] Office Phone Number: [Text]

Notify Client when new Action needs to be completed: [Dropdown]

Notify Tax Pro when Client completes an Action: [Dropdown]

Time Zone: [Dropdown]

Save Cancel

Two Week Free Trial



- ▶ Android has been approved and is available in google play.
- ▶ iPhone is in the approval process.
- ▶ Two week free trial is available now.
- ▶ Both the web production and mobile production is on target to be tested, deployed and ready for the upcoming tax season.
- ▶ Monthly and annual subscriptions are available.
- ▶ www.taxcomm.net
- ▶ sales@taxcomm.net